

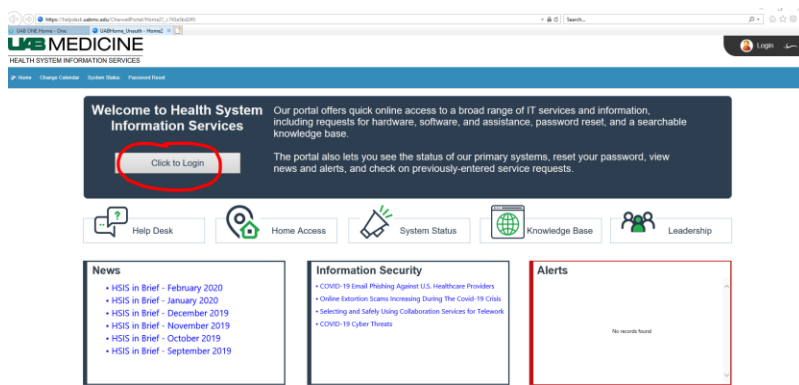
External Clinical Trial Monitor Requests for EHR Access (Coordinator Instructions)

Below you will find the process for obtaining Cerner IMPACT view-only access for research monitors.

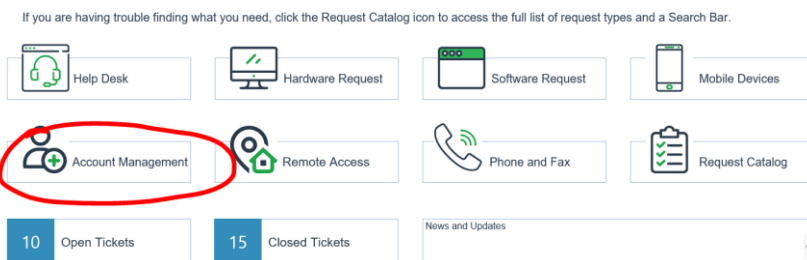
Initial Visit (This process should be initiated at least 30 days prior to the Monitor's Initial Visit):

1. Once a UAB research coordinator is notified of a monitor's upcoming visit, the coordinator should log into the Health System Information Services portal to enter an account request. The research coordinator's 'UABMC ID' is required.

https://helpdesk.uabmc.edu/CherwellPortal/Home?_af743e5bd2#0



2. Click on *Account Management*



3. Complete all fields indicating this is a 'new account' for a 'vendor or other external representative'.
4. Indicate the following: the account is temporary (account must have an expiration date), the request is 'for research purposes' and 'for a research monitor'.
5. Fill in the user's info and indicate that the accounts needed are 'AD (Active Directory)' and 'Cerner (IMPACT)'. Click 'Submit'.

Account Services \ Sign On

Account Creation

Tell us how we can help you:

Estimated Start Date:	<input type="text" value="6/1/2020"/>		
What type of request?:	<input checked="" type="radio"/> New Account <input type="radio"/> Termination Notice <input type="radio"/> Account Update or Reactivation		
Who is this access for?:	<input type="radio"/> Another UABHS Employee <input checked="" type="radio"/> Vendor or Other External Representative <input type="radio"/> Yourself (authorizing supervisors, physicians only)		
Is account temporary?:	<input checked="" type="radio"/> Yes <input type="radio"/> No	Termination Date:	<input type="text" value="6/5/2020"/>
Is this access for research purposes?:	<input checked="" type="radio"/> Yes <input type="radio"/> No	Is this access for a research monitor?:	<input checked="" type="radio"/> Yes <input type="radio"/> No (Required)
User needing Access...			
First Name:	<input type="text" value="John"/>	Middle Name:	<input type="text"/>
Job Title:	<input type="text" value="Monitor"/>		Last Name:
Work Phone:	<input type="text" value="(205) 123-2365 x"/>		Department:
E-mail Address:	<input type="text" value="johntest@gmail.com"/>		Alternate Phone:
Full SSN:	<input type="text" value="12345678"/>		<input type="text" value="() - x"/>
Account(s) Needed:	<input checked="" type="checkbox"/> AD (Active Directory)		
<input type="button" value="Add Attachment"/>		<input type="button" value="Cancel"/>	
		<input type="button" value="Submit"/>	

6. Once submitted the person entering the information (requestor) will receive a service request (SR) number for tracking purposes.
7. Notify the monitor that training must be completed in order to be granted 'view-only' access to Cerner IMPACT.
8. The link to the Cerner IMPACT training will be emailed to the monitor at the address provided.
9. The monitor should complete the training no later than 14 business days prior to the scheduled visit.
10. Once training has been completed, the monitor should reply to the email confirming completion.
11. Login information for the monitor will be emailed to the requestor within 2 business days after training completion.
12. After the request has been entered, the UAB research coordinator will need to set up a patient list in Cerner IMPACT using the following steps (the patient list can be built at any time prior to the monitor's visit):

- a. Open IMPACT
- b. Click 'Patient List' (located in middle top of the page)
- c. Click "wrench" symbol
- d. Choose 'New'
- e. Choose 'Custom'
- f. Click 'Next'
- g. Add Name of Study in box
- h. Click 'Next'
- i. Choose 'Finish'
- Note: When adding patients to the list, highlight the study and click the arrow to move the study to the active list*
- j. Click 'OK'
- k. Click "green man" symbol
- l. Enter MRN
- m. Choose 'Search'
- n. Double click patient's name
- o. When finished adding patient names, click the "wrench" symbol
- p. Highlight the study name
- q. Click the arrow to move back to the available list

To add a Proxy (Note: this must be completed to grant the monitor access):

- a. Move the study name to active

NOTE: If additional created lists are present, please take caution to make sure the appropriate active study name is highlighted for the monitor. If another created list is inadvertently highlighted, the monitor will be given view-only access to this list instead.

- b. Click 'Properties' (sign next to the "wrench" symbol)
- c. Choose 'Proxy'
- d. Choose 'New' located on the bottom right
- e. Choose 'Provider'
- f. Enter the monitor's name (Note: Monitor MUST have completed training & be active)
- g. Choose 'Access'
- h. Choose 'Read-Only'
- i. For "To" date, enter "2100" for the year
- j. Choose 'OK'. The monitor's name and access should show-up on the left.

13. Notify the monitor that the applicable patient list has been created and will be available to view in IMPACT in a "View-Only" manner at the next visit. Please make the monitor aware that the search function has been disabled in this view and the screen is likely to look different from what was presented in training.

Remote Access

1. If the monitor requires remote access to Cerner IMPACT, the *Remote Access-Token Request* form with the fields indicated as shown below will also need to be completed after the above steps have been completed.

https://helpdesk.uabmc.edu/CherwellPortal/Home2?_id=52266692#2

Cherwell Web Portal \ Remote Access

Token Request

Tell us how we can help you:

Use this form to request an RSA SecureID token, or redistribute an already issued token. A token is necessary to gain access to UABHS systems when outside the internal firewall.

What do you want to do?:	<input checked="" type="radio"/> Request a new token (one token per user only) <input type="radio"/> Renew an expiring token <input type="radio"/> Re-Distribute an issued software token to a different device <input type="radio"/> Change Remote Access Method (Existing Token Users Only)														
What do you need access to?:	<input checked="" type="radio"/> Citrix-Apps <input type="radio"/> Citrix-RDP <input type="radio"/> VPN														
Applications you need access to:	<table border="0"> <tr> <td><input checked="" type="checkbox"/> Cerner</td> <td><input type="checkbox"/> Horizon</td> </tr> <tr> <td><input type="checkbox"/> CareAware</td> <td><input type="checkbox"/> Careflow</td> </tr> <tr> <td><input type="checkbox"/> EMMI</td> <td><input type="checkbox"/> HealthQuest</td> </tr> <tr> <td><input type="checkbox"/> Lawson</td> <td><input type="checkbox"/> Neodata</td> </tr> <tr> <td><input type="checkbox"/> Fetalink</td> <td><input type="checkbox"/> iSite</td> </tr> <tr> <td><input type="checkbox"/> IDX</td> <td><input type="checkbox"/> Sunrise</td> </tr> <tr> <td><input type="checkbox"/> PEER</td> <td><input type="checkbox"/> Other</td> </tr> </table>	<input checked="" type="checkbox"/> Cerner	<input type="checkbox"/> Horizon	<input type="checkbox"/> CareAware	<input type="checkbox"/> Careflow	<input type="checkbox"/> EMMI	<input type="checkbox"/> HealthQuest	<input type="checkbox"/> Lawson	<input type="checkbox"/> Neodata	<input type="checkbox"/> Fetalink	<input type="checkbox"/> iSite	<input type="checkbox"/> IDX	<input type="checkbox"/> Sunrise	<input type="checkbox"/> PEER	<input type="checkbox"/> Other
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Who is this access for?:	<input type="radio"/> Yourself <input type="radio"/> Another UABHS Employee <input checked="" type="radio"/> Vendor or External														
Is access temporary?:	<input checked="" type="radio"/> Yes <input type="radio"/> No														
Termination Date:	9/1/2020														

User needing access...

First Name:	John	Last Name:	Test
Job Title:			
E-mail:	Johntest@email.com		
Phone:	(987) 8 - 2 x		
Last 4 SSN:	5555		
Department:	Example Dept		

Is this access needed for research studies only?: ☒ Yes ☐ No

Choose Mobile Device: ☐ Android ☐ iPhone/iPad ☒ On Demand Token

Additional Notes:

2. Once submitted, the requestor will receive a service request (SR) number for tracking purposes.
 - a. Once the above form has been submitted, an email will be generated from "Info Sec Admin" (i.e. Information Security Administrator) that requires the named requestor to "approve" the information via a reply email so that remote access can be given. Please note, after 5 business days the request will be closed and denied.

Subsequent Visits/Reactivation of an IMPACT account

1. The monitor's account will be set to expire either annually or on the study expiration date, whichever occurs first. For continued access the research coordinator must complete the *Account Management* form for reactivation of the account.

UAB MEDICINE
HEALTH SYSTEM INFORMATION SERVICES

Home Change Calendar System Status Knowledge Base Password Reset

Save Abandon Linkup Record 1 of 1

Account Services \ Sign On

Account Creation

Tell us how we can help you:

Estimated Start Date: 4/1/2020

What type of request?

- ☐ New Account
- ☐ Verification Notice
- ☒ Account Update or Reactivation

IMPORTANT: If system access is no longer needed for a research monitor please notify the HSIS Support Desk immediately so the account can be disabled.

Password Resets or Other Issues

1. If a password reset is needed the monitor should contact the HSIS Support Desk at 205-934-8888.